About

Paul specializes in ensuring incorporated professionals take full advantage of the tax saving opportunities that a professional corporation allows.

Paul has 20+years’ experience in financial services and his professional qualifications are extensive. He is the holder of numerous designations including:

- Certified Financial Planner (CFP)
- Canadian Investment Manager (CIM)
- Financial Management Advisor (FMA)
- Fellow of the Canadian Securities Institute (FCSI)

Paul utilizes his technical experience in the creation, implementation and monitoring of corporate investment portfolios.

When requested, he provides a thorough review of existing professional corporation investments and demonstrates ways to improve the overall tax efficiency.

Paul spent over 6 years as a Senior Financial Consultant and Branch Manager at MD Management advising professional clients within the medical community.

Testimonial:

I have had all my financial dealings with Paul Thomas for the *past 15 years and have found him to be very trustworthy.*

Since he left MD Management, he has been able to offer me options that were not available to me before. He has been able to make me feel safe and have no worries about my financial outlook.

Paul has the experience to bring together additional tax ideas along with safe investment products to ensure that I can retire comfortably.

Dr. Jean Long, FRCSC

Contact Paul for a confidential review of your PC and the options available to you.